

Finance Specialist

SUMMARY / PURPOSE OF ROLE

The Finance Specialist (FS) is a key role within the Finance Team at Abundance Canada. As a member of the Finance Team, the FS will be a proactive partner with the Accountant, Accounting Assistant, and the Director of Finance to execute key financial and accounting functions at Abundance Canada. The FS will be the lead financial software subject matter expert, work closely with the Director of Finance to enhance and document financial controls, processes, and procedures, and administer a variety of investment portfolios within approved investment policy statements.

ABUNDANCE CANADA PURPOSE AND VALUES

Abundance Canada is a public foundation with 50 years of experience helping donors across the country make a difference through charitable giving. Formerly the Mennonite Foundation of Canada, in 2022 Abundance Canada attracted \$48 million in donations, managed over \$240 million in assets, and distributed over \$40 million to Canadian charities. Our staff of 23 dedicated professionals are located across Canada. We pride ourselves in keeping the donor experience flexible and easy, no matter the complexity of their charitable plans. Our goal is to double our reach and impact within the decade.

Abundance Canada believes generosity changes everything. Generosity is transformational for the donor and recipient, and the world is a better place when people live generously. We support generosity through customizable charitable giving plans to help donors increase their charitable impact.

Our values are shaped by a vision of generous living, rooted in our story. These values guide our attitudes, decisions, and actions:

- Our relationship with donors is a sacred trust.
- We serve and act with integrity, professionalism, and confidentiality.
- We commit to the work of justice, inclusion, diversity, and equity.

Everyone at Abundance Canada works together as one team to further our purpose and values.

KEY ROLE RESPONSIBILITIES

Financial software

- Has a deep understanding of how the new financial software functions and will become the go-to person for questions and issues related to the software.
- Works with the Finance Team on user acceptance testing, adoption, stabilization, and enhancement of the new financial software.
- Documents and keeps up to date on all processes and procedures related to the new software.
- Ensures the new financial software connects properly with database system, in partnership with the Director of Operations.

Financial Controls and Processes

- Builds cross training among Finance Team members.
- Assists the Director of Finance in procedures and control development and implementation.
- Proactively identifies opportunities for streamlining processes and optimizing utilization of resources.
- Implements external auditors and/or advisor's recommendations.

Investment

- Assists the Director of Finance in administering a range of investment portfolios within approved investment policy statements.
- Implements new procedures regarding the management of segregated portfolios.
- Acts as a backup to the Director of Finance for trading activities and other duties as assigned.

Reporting

- Reviews and analyzes large amounts of data for decision making purposes.
- Assists the Director of Finance in standardizing internal and external client reporting.

Other

- Gains clear understanding of the entire financial business cycle and serves as a backup for other Finance Team members as required.

ROLE SPECIFIC SKILLS AND ABILITIES REQUIRED

- Detail oriented.
- Works interdependently and is a self-starter.
- Resourceful in taking steps to locate appropriate resources to accomplish tasks.
- Proficient with Office 365 Business suite.
- Employs strategic thinking in discussions, decision making and problem solving.

- Demonstrates integrity, professionalism and excellent interpersonal skills required to handle both internal and external communications.

KNOWLEDGE, EXPERIENCE & EDUCATION

- Accounting professional.
- Systems Engineering experience is considered an asset.
- Extensive knowledge and experience with the implementation of accounting/financial software.
- Experience working in the not-for-profit sector is considered an asset.
- A work history of progressively more responsible and complex financial roles.

LOCATION, HOURS OF WORK, POSITION CONDITIONS

This role is based in Winnipeg. Our standard full-time work week is 40 hours (Monday - Friday, 8 hours per day) with allowance for a flexible work schedule by mutual agreement.

Abundance Canada offers a competitive benefits program in addition to ongoing professional development. The salary range for this position is \$82,240 - \$123,360.

REPORTING RELATIONSHIPS AND KEY CONTACTS

Reports to:	Director of Finance
Direct reports:	No
Other relationships:	Brokers or financial advisors